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WRS ACCOUNT UPDATE APPLICATION

These instructions will assist you in securely transmitting Wisconsin Retirement System (WRS) Enrollments, Indicative Data Changes, and Annual Reports directly to ETF via the Internet. In order to use the site you must have been authorized via the *Employer Extranet Application Security Agreement* (ET-8928).

The site applications contain links to the *WRS Administration Manual* (ET-1127). For information regarding WRS eligibility criteria refer to Chapter 3 of the manual; information on creating and correcting an individual's WRS account can be found in Chapter 5; Annual Reporting is discussed in Chapter 9.

I. Access the WRS Account Update Application

a) Enter the following link into your internet browser: http://etfextranet.it.state.wi.us/
b) Click on the WRS Account Update Application.
c) Key your User Name and Password on the Network Password Login Screen & click 'OK'.
d) Enter your 7-digit Employer Identification Number (e.g. 1234000) & click 'Submit'.
e) Click on the desired transaction from the WRS Account Update Application menu. The available transactions are:

WRS Enrollment	(see instruction step II)
Name/Address Change	(see instruction step III)
Employment Begin Date Change	(see instruction step IV)
Gender Change	(see instruction step V)
Employment Category Change	(see instruction step VI)
Annual Processing	(see instruction step VII)

f) Review the employer detail section at the top of the selected screen for accuracy of your employer's WRS agent data. If incorrect, please submit an updated *Designation of Agent* form (ET-1313) to ETF. You may refer to Chapter 2 of the *WRS Administration Manual* (ET-1127) for instructions on completion of the ET-1313.

II. WRS Enrollment - P060

a) Key the SSN of the employee you wish to enroll in the WRS in the ***SSN*** field.
b) Tab to the ***First Name*** field and key the employee's first name.
c) Tab to the ***Middle Initial*** field and key the employee's middle initial, (if applicable).
d) Tab to the ***Last Name*** field and key the employee' last name.
e) Tab to the ***Address*** field and key the employee's complete address (Note: you must have a complete address; otherwise, leave the Address field blank)
f) Tab to the ***Date of Birth*** field and key the employee's date of birth.
g) Tab to the ***Gender*** field and key the employee's gender (either 'M' or 'F').
h) Tab to the ***Statement of Benefits Distribution Code*** field and key the statement of benefits distribution code, if applicable.
i) Tab to the ***WRS Participation Begin Date*** field and key the date your employee became eligible for participation in the WRS.

j) Tab to the ***Employment Category*** field and select the employee's correct employment category.
k) Click on the ***Submit*** button at the bottom of the screen.
l) Review the information you've entered for accuracy, or, if you've been prompted by one of the up-front edits to make a correction, key the necessary changes and click 'Submit' again.
m) Click on the ***Confirm*** button indicating all information is correct. The transaction has been submitted to ETF.
n) Print a copy of the confirmation page that will appear on-screen for your records. For the WRS Enrollment application, print and distribute one copy to your employee for their records.
o) Continue the steps of the application you are using until finished with your updates; you may then logout or return to the menu to begin using other WRS Account Update applications.

III. Name/Address Change - P031

a) Key the SSN of the employee whose name and/or address you wish to update in the ***SSN*** field.
b) Tab to the ***First Name*** field and key the employee's first name.
c) Tab to the ***Middle Initial*** field and key the employee's middle initial, (if applicable).
d) Tab to the ***Last Name*** field and key the employee' last name.
e) Tab to the ***Address*** field, if changing or new, and key the employee's complete address. If processing a Name Change only, the address fields may be left blank. (Note: If processing an Address Change, a complete address must be inserted even if, for example, only the street address is changing.)
f) Tab to the ***Date of Birth*** field and key the employee's date of birth.
g) Tab to the ***Gender*** field and key the employee's gender (either 'M' or 'F').
h) Tab to the ***Employment Category*** field and select the employee's correct employment category as reported on the employee's WRS Enrollment.
i) Click on the ***Submit*** button at the bottom of the screen.
j) Review the information you've entered for accuracy, or, if you've been prompted by one of the up-front edits to make a correction, key the necessary changes and click 'Submit' again.
k) Click on the ***Confirm*** button indicating all information is correct. The transaction has been submitted to ETF.
l) Print a copy of the confirmation page that will appear on-screen for your records.
m) Continue the steps of the application you are using until finished with your updates; you may then logout or return to the menu to begin using other WRS Account Update applications.

IV. Employment Begin Date Change - P033

a) Key the SSN of the employee whose WRS eligibility date you wish to change in the ***SSN*** field.
b) Tab to the ***First Name*** field and key the employee's first name.
c) Tab to the ***Middle Initial*** field and key the employee's middle initial, (if applicable).
d) Tab to the ***Last Name*** field and key the employee' last name.
e) Tab to the ***Date of Birth*** field and key the employee's date of birth.
f) Tab to the ***Gender*** field and key the employee's gender (either 'M' or 'F').

g) Tab to the ***WRS Participation Begin Date*** field and key the corrected date that your employee became eligible for participation in the WRS at your agency. Note: If you are changing your employee's WRS begin date to an earlier or later year you may need to adjust service and earnings reported to WRS on behalf of that employee.
h) Tab to the ***Employment Category*** field and select the employee's correct employment category.
i) Click on the ***Submit*** button at the bottom of the screen. Review the information you've entered for accuracy, or, if you've been prompted by one of the up-front edits to make a correction, key the necessary changes and click 'Submit' again.
j) Click on the ***Confirm*** button indicating all information is correct. The transaction has been submitted to ETF.
k) Print a copy of the confirmation page that will appear on-screen for your records.
l) Continue the steps of the application you are using until finished with your updates; you may then logout or return to the menu to begin using other WRS Account Update applications.

V. Gender Change - P036

a) Key the SSN of the employee whose gender was incorrectly denoted on the original WRS Enrollment in the ***SSN*** field.
b) Tab to the ***First Name*** field and key the employee's first name.
c) Tab to the ***Middle Initial*** field and key the employee's middle initial, (if applicable).
d) Tab to the ***Last Name*** field and key the employee' last name.
e) Tab to the ***Date of Birth*** field and key the employee's date of birth.
f) Tab to the ***Gender*** field and key the employee's correct gender (either 'M' or 'F').
g) Tab to the ***Employment Category*** field and select the employee's correct employment category.
h) Click on the ***Submit*** button at the bottom of the screen.
i) Review the information you've entered for accuracy, or, if you've been prompted by one of the up-front edits to make a correction, key the necessary changes and click 'Submit' again.
j) Click on the ***Confirm*** button indicating all information is correct. The transaction has been submitted to ETF.
k) Print a copy of the confirmation page that will appear on-screen for your records.
l) Continue the steps of the application you are using until finished with your updates; you may then logout or return to the menu to begin using other WRS Account Update applications.

VI. Employment Category Change - P063

a) Key the SSN of the employee whose WRS employment category was incorrectly denoted on the original WRS Enrollment in the ***SSN*** field.
b) Tab to the ***First Name*** field and key the employee's first name.
c) Tab to the ***Middle Initial*** field and key the employee's middle initial, (if applicable).
d) Tab to the ***Last Name*** field and key the employee' last name.
e) Tab to the ***Date of Birth*** field and key the employee's date of birth.
f) Tab to the ***Gender*** field and key the employee's gender (either 'M' or 'F').
g) Tab to the ***WRS Participation Begin Date*** field and key the date your employee became eligible for participation in the WRS, as reported to WRS on the WRS Enrollment.
h) Tab to the ***Incorrect Employment Category*** field and select the employee's incorrect employment category as incorrectly reported on the WRS Enrollment.

i) Tab to the ***<u>Correct Employment Category</u>*** field and select the employee's <u>correct</u> employment category. (Note: WRS Employment Category descriptions can be found in Chapter 3 of the *WRS Administration Manual* (ET-1127).)
j) Click on the ***<u>Submit</u>*** button at the bottom of the screen.
k) Review the information you've entered for accuracy, or, if you've been prompted by one of the up-front edits to make a correction, key the necessary changes and click 'Submit' again.
l) Click on the ***<u>Confirm</u>*** button indicating all information is correct. The transaction has been submitted to ETF.
m) Print a copy of the confirmation page that will appear on-screen for your records.
n) Continue the steps of the application you are using until finished with your updates; you may then logout or return to the menu to begin using other WRS Account Update applications.

VII. Annual Processing

a) 'Annuals Entry Form' screen displays, listing the first employee from your pre-list without a completed Action Code field, indicating an unprocessed annual. Information displayed on the screen will consist of employee last name, first name, last 4 digits of their Social Security Number and employment category. ***<u>Review</u>*** the information displayed:
    - If all information is correct go to Step VII b).
    - If name is incorrect go to Step III to make correction, then proceed to Step VII b).
    - If employment category is incorrect, and no service and earnings have ever been reported to the incorrect employment category, go to Step VI to correct the employment category, then proceed to Step VII b).
    - If employment category is incorrect due to a change in employment category, and previous service and earnings have been reported to the previous employment category, go to Step II to enroll the employee in the current employment category, then proceed to Step VII l (Add New).
b) Select the appropriate ***<u>Action Code</u>*** for the employee displayed:
    - 00 – Annual with Earnings
    - 40 – Annual without Earnings
    - 50 – Military/ Union Leave
    - 51 – Unpaid Leave of Absence
    - 53 – Begin Layoff
    - Skip – Employee is on pre-list in error (e.g., a termination report is being submitted or has been submitted)
c) Insert the correct ***<u>Action Date</u>*** for the employee displayed, in conjunction with *the Action Code* used:
    - Action Code 00 – Pre-filled with 12/31/YR, with YR being current processing year.
    - Action Code 40 – Requires blank Action Date.
    - Action Code 50 – Requires blank Action Date.
    - Action Code 51 – Requires blank Action Date.
    - Action Code 53 – Requires blank Action Date.
    - Skip – Requires blank Action Date.
d) Insert the correct ***<u>Last Earnings Date</u>*** for the employee displayed, in conjunction with the *Action Code* used:
    - Action Code 00 – Requires blank Last Earnings Date.
    - Action Code 40 – Requires Last Earnings Date of 12/31/YR, with YR being current processing year.
    - Action Code 50 – Requires Last Earnings Date in the current processing year.

- Action Code 51 – Requires Last Earnings Date in the current processing year.
- Action Code 53 – Requires Last Earnings Date in the current processing year.
- Skip – Requires blank Last Earnings Date.

e) Complete ***Hours and Earnings*** fields:
- January to June – Complete only for employment categories 05, 07, 08, 10, 11 or 12. (Note: may never be greater than calendar year to date figures.)
  - Action Code 00 – Required for fiscal year employees hired on or after July 1.
  - Action Code 40 – Requires blank hours and earnings.
  - Action Code 50 – Required for fiscal year employees if applicable.
  - Action Code 51 - Required for fiscal year employees if applicable.
  - Action Code 53 - Required for fiscal year employees if applicable.
- Calendar Year to Date - Complete for all employment categories.
  - Action Code 00 – Required for all employees.
  - Action Code 40 – Requires blank hours and earnings.
  - Action Code 50 – Required for all employees if applicable.
  - Action Code 51 - Required for all employees if applicable.
  - Action Code 53 - Required for all employees if applicable.

f) Complete ***Deducted from Employee*** fields only if required contributions were actually paid by the employee. If contributions were all paid by employer, leave fields blank.
- Employee Required Contribution – Can not exceed the Employee Required Contribution percentage for the employee's employment category multiplied by the employee's Calendar Year to Date earnings.
- Benefit Adjustment Contribution – Can not exceed the Benefit Adjustment Contribution percentage (if any) for the employee's employment category multiplied by the employee's Calendar Year to Date earnings.

g) Complete the ***Additional Contribution*** fields for employees who had additional contributions remitted to the WRS. Contributions remitted must be allocated to the Fixed annuity fund, the Variable annuity fund, or a combination thereof, based upon the employees fund participation:
- Employee Paid – Additional Contributions paid by the employee post tax.
- Employer Paid – Additional Contributions paid by the employer on behalf of the employee.
- Tax Deferred – Additional Contributions made from a salary reduction agreement. (Available to certain school district employees only.)

h) Click on the ***Save*** button at the bottom of the 'Annuals Entry Form' screen to save the employee's annual detail. The next employee from your pre-list without a completed Action Code field, indicating an unprocessed annual, will be displayed.

i) Repeat Steps VII a) through VII h) until all employees on the pre-list have been updated. The ***Action Code*** field must be completed for each employee on the pre-list.

j) Once the last employee record on the pre-list has been saved, the ***Review*** and ***Add New*** buttons will appear at the bottom of the 'Annuals Entry Form' screen.

k) If all employees' annual detail has been completed go to Step VII u). If you need to add an employee to the pre-list go to Step VII l).

l) If an employee with hours and earnings paid in the current processing year was not on the pre-list, click the ***Add New SSN*** button. The 'Annuals Entry Form – Add' screen will appear. (If the employee was not enrolled in WRS, go to Step II to enroll them in WRS.)

m) Enter the employee's nine-digit number in the ***Social Security Number*** field.

n) Enter the employee's first name in the ***First Name*** field.

o) Enter the employee's middle initial in the ***Middle Initial*** field (optional).

p) Enter the employee's last name in the ***Last Name*** field.

q) Select the employee's proper employment category from the ***Employment Category*** field.

r) Continue processing as instructed in Step VII b) through VII g), then click ***Save New*** button.
s) Review the newly saved annual detail. If incorrect, make the necessary corrections and again click the ***Save New*** button.
t) Click the ***Confirm Save*** button when the annual detail for the newly added employee is accurate. A cleared 'Annuals Entry Form – Add' screen will appear to add, if necessary, another employee following Steps VII m) through VII t).
u) Click on the ***Review*** button. The 'Annuals Review Form' screen will appear showing the detail entered for all employees.
v) Click on the ***Review Additional*** button to review the additional contribution amounts entered, if any. The 'Annuals Review Additional Contributions' screen will appear showing all employees with additional contributions amounts entered.
w) Click on the ***Summary*** button. The 'Annuals Summary Form' screen will appear showing total annual detail by employment category.
x) Click on the ***Print*** button if all annual detail totals agree with your predetermined totals. Retain a copy of the annual detail totals screen print for your records.
y) Click on the ***Final Submit*** button. Your annual detail has been submitted to ETF.

Please contact the Employer Communication Center at (608) 264-7900 if you have eligibility or reporting questions or encounter problems performing any of the applications on this site.